



Standards Set

2012 ibstpi<sup>®</sup>

## **Instructional Designer Standards: Competencies & Performance Statements**

The 2012 ibstpi<sup>®</sup> Instructional Designer Competencies and Performance statements are copyrighted by the International Board of Standards for Training, Performance and Instruction<sup>®</sup> (ibstpi<sup>®</sup>). This is a personal copy of the ibstpi<sup>®</sup> Instructional Designer Standards intended only for the user who purchased this copy. Permission must be obtained from ibstpi<sup>®</sup> prior to any other use, reproduction, storage, or transmission in any form. All rights reserved. A copyright request form can be obtained at [www.ibstpi.org](http://www.ibstpi.org).

---

## **ibstpi® INTERNATIONALLY VALIDATED STANDARDS**

These training, performance, and instruction standards that ibstpi® produced were developed using rigorous and systematic processes that ensures the validity and reliability of each competency and performance statement within this set. Performance standards resources generally used by practitioners in various fields are “how to” materials largely based on anecdotal data, conventional wisdom, and intuitive judgments regarding what constitutes “best practices” of training, performance, and instruction professionals. ibstpi® has a long history of competency development that involves literature review, primary research, and input from a broad cross-section of professionals who participate in ibstpi® development and validation studies. Our international validation process can involve 1,000 or more participants from multiple working contexts. Thus, competencies and their associated performance statements are developed and validated based on the expertise of the ibstpi® competency development teams and the knowledge of many other accomplished training, performance, and instruction professionals representing diverse organizations, institutions, and programs from around the world. We highly recommend acquiring the 4<sup>th</sup> edition of the *Instructional Designer Competencies: The Standards* (expected publication October 2013, Info Age Publications) to learn more about these standards and their validation process.

## **ABOUT THE ibstpi® INSTRUCTIONAL DESIGNER STANDARDS**

The settings for, and conditions under which, instructional designer work has continually changed over the years provides a backdrop for the emergence of new complex practices. Instructional designers have moved from working as individuals creating training to working in interdisciplinary design teams addressing complex human performance deficiencies in multiple contexts using a variety of methodologies and digital/non-digital tools to create instructional solutions.

These circumstances suggest that designers should be well versed in design sciences, development practices, and the features of a variety of new and emerging media that lend themselves to facilitating different types of learning. Designers must demonstrate systemic thinking practices and choose sound instructional design and development tools to support their own productivity and maintain high levels of effectiveness and quality in instructional solutions. They must be able to communicate effectively with multiple types of people and able to analyze an environment to determine knowledge and skill gaps that may be resolved by instructional (and non-instructional) solutions. They must understand how their audience learns and be able to perform learning assessments, evaluation processes, and basic research. This new set of ibstpi® standards provides a list of internationally validated instructional designer competencies and performance statements for all of these situations and more.

## **ABOUT THE 2012 REVISIONS**

There are 22 newly updated and re-validated ibstpi® instructional designer competencies in the revised 2012 Standards Set. These competencies are clustered into 5 domains and are supported by 105 performance statements. They reflect the fact that the field of instructional design has grown in breadth, depth, and complexity such that no one person can be expected to be fully competent in all related skills and knowledge. Thus, each competency and statement has been classified (by experts) into those competencies most appropriate for new instructional designers, experienced instructional designers, and those who manage instructional design functions.

## **APPLICATIONS OF THESE STANDARDS**

There are four general groups of professionals who use ibstpi® Instructional Designer Competencies: (1) **ID practitioners** – to plan for individual professional development; **ID (or training) managers/administrators** – to manage Human Resources functions, ID projects and teams, to benchmark against best practices in ID, and to educate management on the criticality of ID; (3) **ID-oriented academics** – to develop/update curricula, to support accrediting or evaluation of ID programs, to assess student performance/progress, and to establish research agendas; (4) **Associations** that offer instructional design-related professional development and certification.

## PROFESSIONAL FOUNDATIONS

### 1. *Communicate effectively in visual, oral and written form. (essential)*

- a) Write and edit messages that are clear, concise, and grammatically correct (*essential*)
- b) Deliver presentations that effectively engage audiences and communicate clear messages (*essential*)
- c) Use active listening skills (*essential*)
- d) Solicit, accept, and provide constructive feedback (*essential*)
- e) Present written and oral messages that take into account the type of information being delivered and the diverse backgrounds, roles, and varied responsibilities of the audience (*advanced*)
- f) Facilitate meetings effectively (*advanced*)
- g) Use effective collaboration and consensus-building skills (*advanced*)
- h) Use effective negotiation and conflict resolution skills (*advanced*)
- i) Use effective questioning techniques (*advanced*)
- j) Disseminate status, summary, or action-oriented reports (*advanced*)

### 2. *Apply research and theory to the discipline of instructional design. (advanced)*

- a) Explain key concepts and principles related to instructional design (*essential*)
- b) Apply systems thinking to instructional design and performance improvement projects (*essential*)
- c) Apply results of instructional design research, theory, and practice (*advanced*)
- d) Promote how instructional design research, theory, and practice literature may affect design practices in a given situation (*advanced*)
- e) Apply concepts, techniques, and theories of other disciplines to learning and performance improvement (*advanced*)

### 3. *Update and improve knowledge, skills, and attitudes pertaining to the instructional design process and related fields. (essential)*

- a) Participate in professional development activities (*essential*)
- b) Establish and maintain contacts with other professionals (*essential*)
- c) Acquire and apply new technology skills in instructional design practice (*essential*)
- d) Document and disseminate work as a foundation for future efforts, publications, or professional presentations (*advanced*)

### 4. *Apply data collection and analysis skills in instructional design projects. (advanced)*

- a) Identify the data to be collected (*advanced*)
- b) Use a variety of data collection tools and procedures (*essential*)
- c) Apply appropriate data collection methodologies to needs assessment and evaluation (*advanced*)
- d) Use appropriate quantitative and/or qualitative analysis procedures in needs assessment and evaluation (*advanced*)

**5. Identify and respond to ethical, legal, and political implications of design in the workplace. (essential)**

- a) Identify ethical, legal, and political dimensions of instructional design practice and instructional products (*advanced*)
- b) Plan for and respond to ethical, legal, and political consequences of design decisions (*advanced*)
- c) Recognize and respect the intellectual property rights of others (*essential*)
- d) Adhere to regulatory guidelines and organizational policies (*essential*)
- e) Comply with organizational and professional codes of ethics (*essential*)

## PLANNING AND ANALYSIS

**6. Conduct a needs assessment in order to recommend appropriate design solutions and strategies. (advanced)**

- a) Identify varying perceptions of need among stakeholders and the implications of those perceptions (*advanced*)
- b) Describe the nature of a learning or performance problem (*essential*)
- c) Determine the root causes of identified discrepancies (*advanced*)
- d) Synthesize findings to identify and recommend potential instructional and non-instructional solutions (*advanced*)
- e) Estimate costs and benefits of possible solutions (*advanced*)
- f) Prepare and disseminate a needs assessment report (*advanced*)

**7. Identify and describe target population and environmental characteristics. (essential)**

- a) Determine characteristics of the target population that may impact the design and delivery of instruction (*essential*)
- b) Determine characteristics of the physical, social, political, and cultural environment that may influence learning, attitudes, and performance (*advanced*)
- c) Identify the infrastructure that is available to support the design and delivery of instruction (*advanced*)
- d) Determine the extent to which organizational mission, philosophy, and values may impact the design and delivery of instruction (*advanced*)
- e) Analyze, evaluate, and use learner profile data and environmental characteristics to design instruction (*essential*)

**8. Select and use analysis techniques for determining instructional content. (essential)**

- a) Identify the scope of required content in accordance with needs assessment findings (*essential*)
- b) Elicit, synthesize, and validate content from subject matter experts (*essential*)
- c) Analyze existing instructional products to determine adequacy or inadequacy of content, instruction, and learning (*essential*)
- d) Determine the breadth and depth of intended content coverage given instructional constraints (*essential*)
- e) Determine subordinate and prerequisite skills and knowledge (*essential*)
- f) Use appropriate techniques to analyze various types and sources of content (*essential*)

**9. Analyze the characteristics of existing and emerging technologies and their potential use. (essential)**

- a) Describe the capabilities of existing and emerging technologies required to enhance the impact of instruction (*essential*)
- b) Evaluate the capacity of given instructional and learning environments to support selected technologies (*advanced*)
- c) Assess the benefits and limitations of existing and emerging technologies (*advanced*)

## **DESIGN AND DEVELOPMENT**

**10. Use an instructional design and development process appropriate for a given project. (essential)**

- a) Select or create an instructional design process based the nature of the project (*essential*)
- b) Modify the instructional design process as project parameters change (*advanced*)
- c) Describe a rationale for the selected, created or modified instructional design process (*advanced*)

**11. Organize instructional programs and/or products to be designed, developed, and evaluated. (essential)**

- a) Determine the overall scope of instructional programs and/or products (*advanced*)
- b) Identify and sequence instructional goals (*essential*)
- c) Specify and sequence the anticipated learning and performance outcomes (*essential*)

**12. Design instructional interventions. (essential)**

- a) Identify instructional strategies that align with instructional goals and anticipated learning outcomes (*essential*)
- b) Apply appropriate interaction design and interactive learning principles (*essential*)
- c) Use appropriate message and visual design principles (*essential*)
- d) Apply appropriate motivational design principles (*essential*)
- e) Accommodate social, cultural, political, and other individual factors that may influence learning (*essential*)
- f) Select appropriate technology and media to enhance instructional interventions, taking into account theory, research, and practical factors (*essential*)

**13. Plan non-instructional interventions. (advanced)**

- a) Identify which, if any, non-instructional interventions are appropriate (e.g., performance support, knowledge management, personnel selection, job redesign, incentive systems) (*advanced*)
- b) Justify why non-instructional interventions are appropriate (*advanced*)
- c) Create design specifications for non-instructional interventions (*advanced*)

**14. Select or modify existing instructional materials. (essential)**

- a) Identify and select materials that support the content analyses, proposed technologies, delivery methods, and instructional strategies (*essential*)
- b) Conduct cost-benefit analyses to decide whether to use or modify existing materials (*advanced*)
- c) Validate selection or modification of existing instruction (*advanced*)
- d) Integrate existing instructional materials into the design (*essential*)

**15. Develop instructional materials. (essential)**

- a) Develop specifications that serve as the basis for media production (*essential*)
- b) Produce instructional materials in a variety of delivery formats (*essential*)
- c) Develop materials that align with the content analyses, proposed technologies, delivery methods, and instructional strategies (*essential*)
- d) Collaborate with production specialists (*essential*)

**16. Design learning assessment. (advanced)**

- a) Identify the learning processes and outcomes to be measured (*essential*)
- b) Construct reliable and valid methods of assessing learning and performance (*advanced*)
- c) Ensure that assessment is aligned with instructional goals, anticipated learning outcomes, and instructional strategies (*essential*)

## EVALUATION AND IMPLEMENTATION

**17. Evaluate instructional and non-instructional interventions. (advanced)**

- a) Design evaluation plans (*advanced*)
- b) Implement formative evaluation plans (*essential*)
- c) Implement summative evaluation plans (*essential*)
- d) Prepare and disseminate evaluation report (*advanced*)

**18. Revise instructional and non-instructional solutions based on data. (essential)**

- a) Identify product and program revisions based on review of evaluation data (*advanced*)
- b) Revise the delivery process based on evaluation data (*essential*)
- c) Revise products and programs based on evaluation data (*essential*)

**19. Implement, disseminate, and diffuse instructional and non-instructional interventions. (advanced)**

- a) Create a vision of change that aligns learning and performance goals with organizational goals (*managerial*)
- b) Plan for the implementation of the interventions (*advanced*)
- c) Plan for the dissemination of the interventions (*managerial*)
- d) Plan for the diffusion of the interventions (*managerial*)
- e) Disseminate the interventions (*advanced*)
- f) Monitor implementation, dissemination, and diffusion progress (*managerial*)
- g) Identify required modifications to implementation, dissemination, and diffusion processes (*advanced*)



## MANAGEMENT

### 20. Apply business skills to managing the instructional design function. (*managerial*)

- a) Align instructional design efforts with organization's strategic plans and tactics (*managerial*)
- b) Establish standards of excellence for the instructional design function (*managerial*)
- c) Develop a business case to promote the critical role of the instructional design function (*managerial*)
- d) Recruit, retain, and develop instructional design personnel (*managerial*)
- e) Develop financial plans and controls for the instructional design function (*managerial*)
- f) Obtain and maintain management and stakeholder support for the design function (*managerial*)
- g) Market instructional design services and manage customer relations (*managerial*)

### 21. Manage partnerships and collaborative relationships. (*managerial*)

- a) Identify stakeholders and the nature of their involvement (*advanced*)
- b) Build and promote effective relationships between the design team and stakeholders (*managerial*)
- c) Manage cross functional teams (*managerial*)
- d) Conduct project reviews with design team members and stakeholders (*managerial*)

### 22. Plan and manage instructional design projects. (*advanced*)

- a) Establish project scope and goals (*advanced*)
- b) Write proposals for instructional design projects (*advanced*)
- c) Use a variety of planning and management tools for instructional design projects (*advanced*)
- d) Allocate resources to support the project plan (*managerial*)
- e) Manage multiple priorities to maintain project time line (*managerial*)
- f) Identify and resolve project issues (*managerial*)

## **ibstpi<sup>®</sup> Standards Sets... our Intellectual Property**

Thank you for acquiring a *personal copy* of one of the *ibstpi<sup>®</sup> Standards Sets*! We encourage you to avail yourself to this *ibstpi<sup>®</sup> Standards Set* for your own *personal uses*.

The *ibstpi<sup>®</sup> Standards Sets* (Competencies and Performance Statements) however, whether in English or another language, are covered by copyright laws and intellectual property standards. Therefore, should you wish to share and/or distribute this *Standards Set* with anyone, in any format (digital, paper copies, etc.), you must seek permission to from *ibstpi<sup>®</sup>* to do so. *ibstpi<sup>®</sup> Standards Sets*, containing the associated competencies and performance statements, are **not to be published** in any form, on any public, private, or internal websites that can be accessed by any member of the public, inside or outside of your organization, **without prior explicit permission from *ibstpi<sup>®</sup>***. Purchasing or accessing this personal set of *ibstpi<sup>®</sup> Standards Sets* (Competencies and Performance Statements) does not constitute permission to adopt them across your organization, with others you are associated with, or with your own clients. You may only use this *ibstpi<sup>®</sup> Standards Set* for your own personal uses. This does NOT allow you to post the *Standards Set*, or any part of it, in venues where others can access or read the stated standards, competencies, or performance statements.

ALL non-personal, external uses require the user (purchaser of this *ibstpi<sup>®</sup> Standards Set*) to register with *ibstpi<sup>®</sup>* as a user and negotiate permission to copy, distribute, post, etc. **prior** to release of any information within this *ibstpi<sup>®</sup> Standards Set*. This negotiation may include determining a royalty agreement.

## **Note for authors and researchers**

We welcome authors and researchers to make reference to, or use, *ibstpi<sup>®</sup> Standards Sets* in their work. Several research papers, professional presentations, theses, and dissertations have been written about the *ibstpi<sup>®</sup>* standards, some using, with permission, *ibstpi<sup>®</sup>* competencies and performance statements as instrumentation for research. We acknowledge that ongoing research by other scholars is necessary to continue the discourse that validates as well as challenges the characterization of a professional practice.

General references to *ibstpi<sup>®</sup>* works (e.g., books, *Standards Sets*) should be made in the appropriate citation format (i.e., APA) for your work. However, it is compulsory for authors and researchers (including students) to contact *ibstpi<sup>®</sup>* about their intended uses to replicate all or any portion of an *ibstpi<sup>®</sup> Standards Sets*. The negotiation with *ibstpi<sup>®</sup>* will include a description of your work context (e.g., profit/non-profit, education, research), how and how much of the standards are intended to be used by requestors, and publication and/or research plans. Based on the request, *ibstpi<sup>®</sup>* will provide specific guidelines as to the use and subsequent publication of the standards and may suggest a payment or royalty, as appropriate. Reprinting or using *ibstpi<sup>®</sup> Standards Sets*, beyond personal uses **without** permission, is a violation of copyright law and intellectual property standards.

Please visit [www.ibstpi.org](http://www.ibstpi.org) for further instructions on using and citing *ibstpi<sup>®</sup> Standards Sets* in your publications or research. We invite those who reference or use *ibstpi<sup>®</sup> Standards* in their work to share results and references to publications and presentations, etc. so that we can highlight them on the *ibstpi<sup>®</sup>* website.

## **Collaborations with *ibstpi<sup>®</sup>* Directors**

*ibstpi<sup>®</sup>* Directors, Past Directors, Research Associates, and Advisors are located around the world and have access to many different types of working and learning environments. We are passionate about our work and our role with *ibstpi<sup>®</sup>*. We enjoy discussing and debating topics related to training, performance, and instruction, and we have a multitude of experiences and insights into the area of competency development and uses. We encourage you to contact one or more of the Directors if you wish to collaborate on your project.

**Visit us at: [www.ibstpi.org](http://www.ibstpi.org)**